LeanData Routing

Merge Duplicates Guide

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Overview

The following guide will walk through LeanData Router Merge Duplicates features. When utilizing a Merging node within your Router Configuration, LeanData will merge the records according to your merge preferences. The routed object record (Lead/Contact) will be merged away in favor of the existing record.

Please Note: Merging records is not a reversible action. Only utilize the Merge Duplicates feature after testing to ensure the functionality is configured to your expectations.

Merge Duplicates functionality includes:

- Full control available natively within Salesforce.com
- Merging Salesforce Leads and Contacts with existing duplicate Leads and Contacts
- Selecting preference of values to utilize in the merged record

Adding Merge Duplicate Nodes in FlowBuilder

The settings discussed in this guide will only come into consideration when utilizing Duplicate Match nodes and Duplicate Merge nodes within FlowBuilder.

Duplicate Match Nodes

There are several different Duplicate Match nodes. Within Lead Router, there is one for matching Leads with Duplicate Leads and another for matching Leads with Duplicate Contacts. Within Contact Router there is a node for matching Contacts with Duplicate Contacts. You can configure filters and tiebreakers within these Match nodes as you would any other Match node.

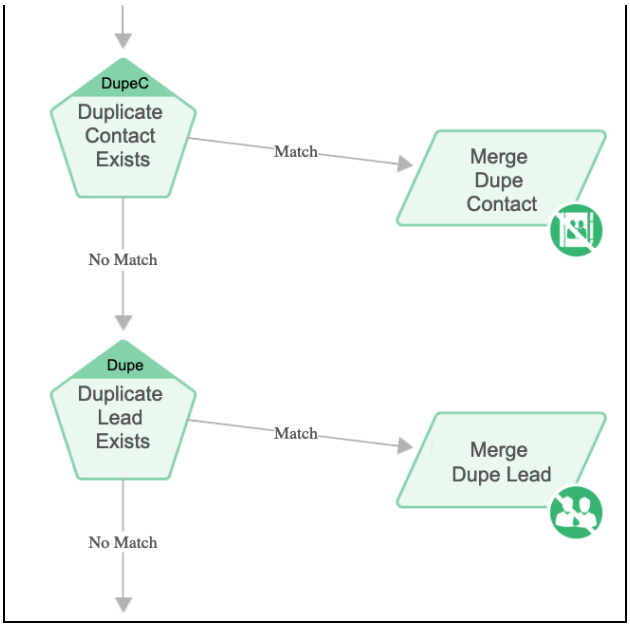
Please Note: The Duplicate Lead Match Node is distinct from the Lead2Lead Match Node, which is used to identify a related Lead from the same company, but not necessarily the same individual.

The Duplicate Contact Match Node is distinct from the Contact2Contact Match Node which is used to identify a different Contact found under the same Account, but not necessarily the same individual.

Within Lead Router, you can utilize both Duplicate Match Nodes if desired, simply sequence them according to which duplicates you wish to prioritize.

Duplicate Merge Action Nodes

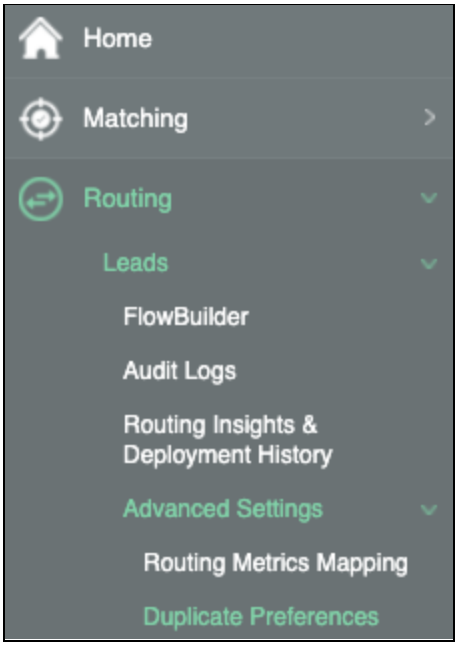
After finding a Duplicate Contact or a Duplicate Lead match, you will be able to utilize the corresponding Merge Nodes (**Merge Dupe Contact** or **Merge Dupe Lead**) to merge the duplicates together.



Note: In order for LeanData to perform a Lead-to-Duplicate-Contact Merge, the routed Lead will first be converted into a Contact, and then the Contact will be merged into the Master Contact. You will have to set a converted Lead status in the Merge Duplicate Contact Node, and also ensure the originating Lead is not owned by a Queue.

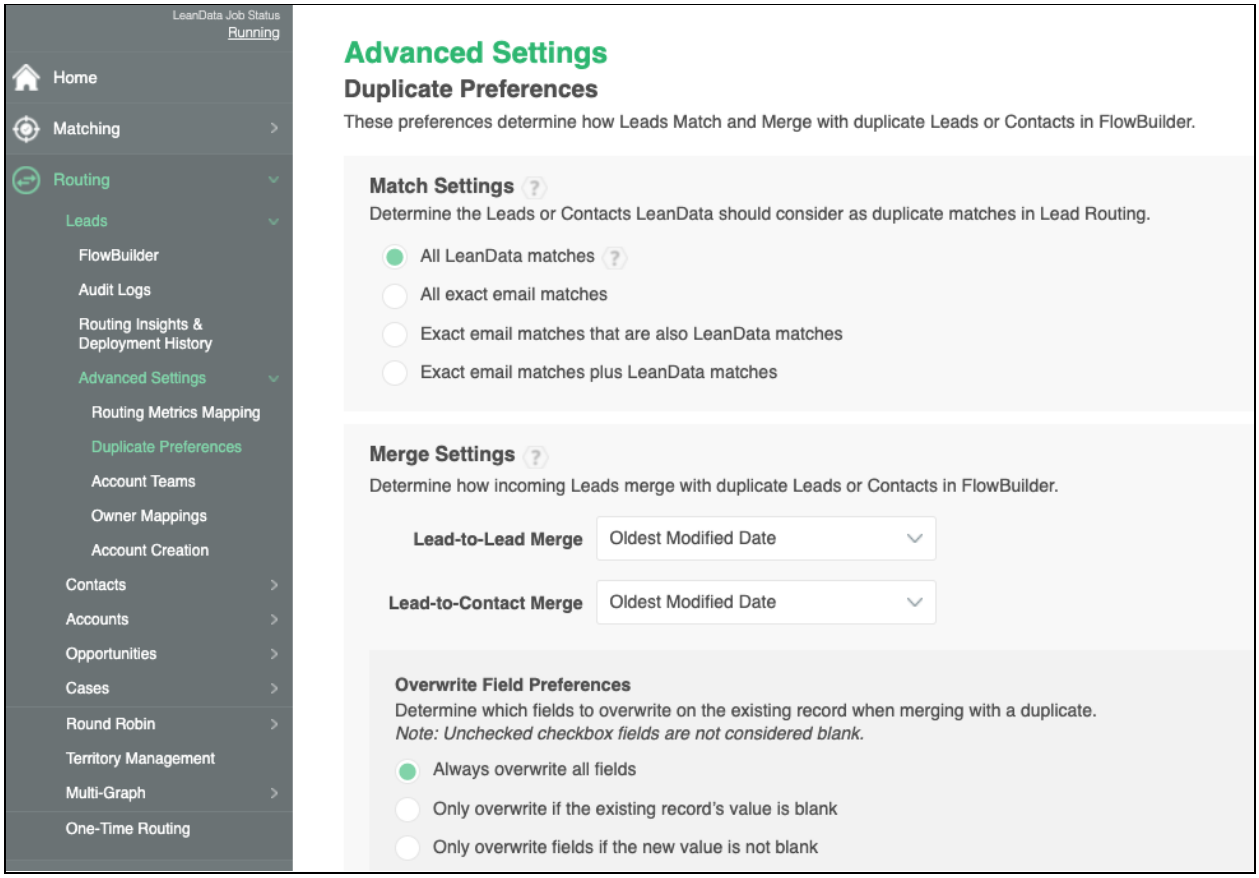
Where to Configure your Merge Preferences

Your merge preferences will be configured on a separate page from your Router configuration. To access these preferences, navigate from your LeanData Dashboard to Routing → Leads → Advanced Settings → Duplicate Preferences.



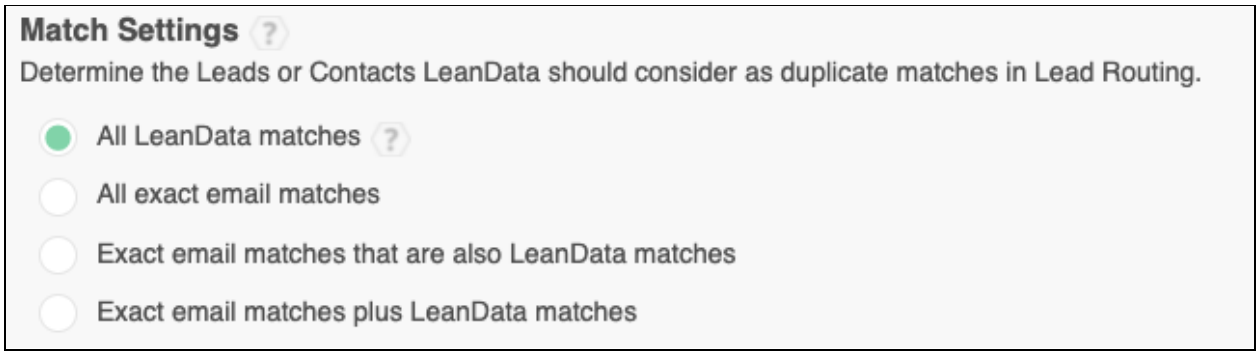
Duplicate Preferences

These preferences determine how Leads/Contacts and merge with duplicate Leads or Contacts in FlowBuilder.



Match Settings

The Match Settings are used to determine which routed records (Lead/Contact) are duplicates of existing records. The routed record is considered the duplicate of the existing record.



All LeanData Matches
LeanData's Matching Algorithm conducts fuzzy matching across several fields on the incoming Lead and existing Leads or Contacts. Select this option if you would like to use this to identify duplicate Leads and Contacts. This is the default setting.

All Exact Email Matches
Select this option if you would like to consider every instance where there is an exact email address match to be a duplicate, ***instead of*** using LeanData's Matching Algorithm. There may be some instances where two Leads will share a generic email address like info@companyname.com, but represent different individuals, so LeanData has this set to "No" by default.

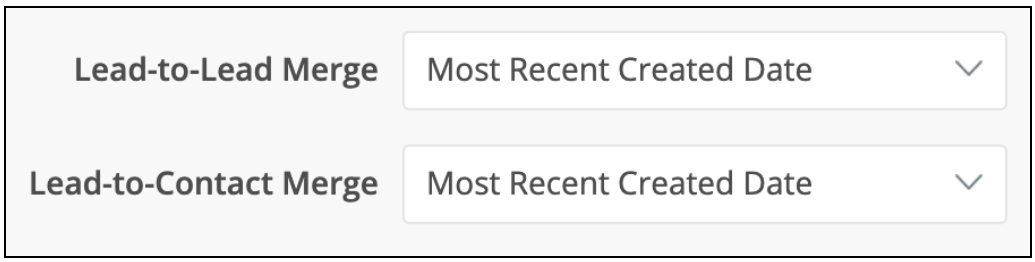
Exact Email Address Matches That are Also LeanData Matches
This option will surface matches based on the exact email match and the LeanData Matching Algorithm. Only duplicates that fit both criteria will be surfaced.

Email Matches Plus LeanData Matches
Select this option if you would like to add exact email address matches in addition to the duplicate matches found using the LeanData Matching Algorithm. This will include more potential duplicates, and the best duplicate will therefore be selected using any tiebreaker rules you have configured in your Duplicate Matching Nodes.

Merge Settings

Determine how incoming Leads or Contacts merge with duplicate Leads or Contacts in FlowBuilder. The Merge Settings control how fields are overwritten during the merge process. The Routed record is merged into the existing (Master) record.

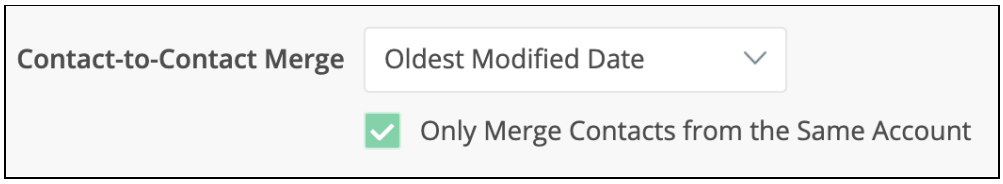
Lead-to-Lead Merge & Lead-to-Contact Merge



These settings will control which record's values will be kept for the master record. You can prefer either the record with either the Oldest or Newest Created Date, Oldest or Newest Last Modified Date, or Oldest or Newest Last Activity Date. When the Lead-to-Lead setting is set to Oldest (Created, Activity, or Modified) Date and the existing record is the oldest, then the older record's fields won't be overwritten. Other objects such as Tasks or Related Activities will be transferred to the older record.

Please Note: This does NOT determine which record will remain as the master record. This setting only controls which set of values will be carried into the resulting merged (master) record. The existing record (not the record being routed) and all its related objects will always be considered the master record.

Contact-to-Contact Merge (Contact Routing Only)



This setting will control which record's values will be kept for the master record. You can prefer either the record with either the Oldest or Newest Created Date, Oldest or Newest Last Modified Date, or Oldest or Newest Last Activity Date. When the Contact-to-Contact setting is set to Oldest (Created, Activity, or Modified) Date and the existing record is the oldest, then the older record's fields won't be overwritten. Other objects such as Tasks or Related Activities will be transferred to the older record.

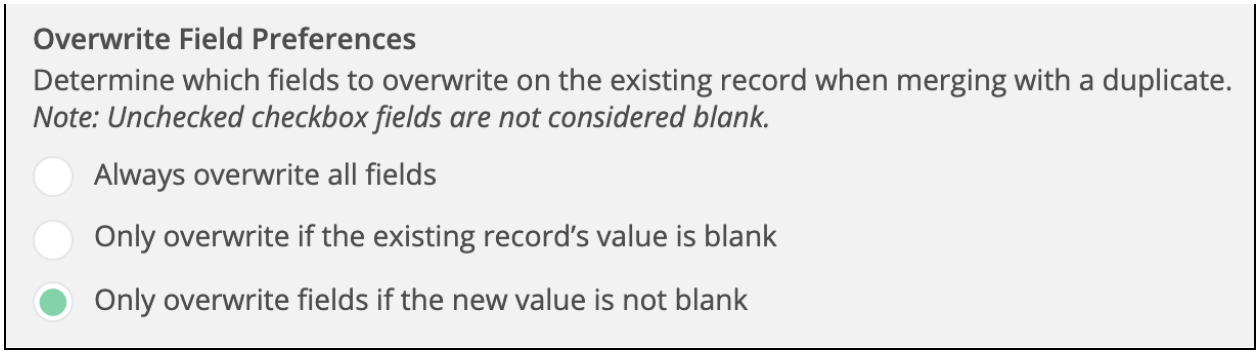
Please Note: This does NOT determine which record will remain as the master record. This setting only controls which set of values will be carried into the resulting merged (master) record. The existing record (not the record being routed) will always be considered the master record.

Only Merge Contacts from the Same Account (Contact Routing Only)

This setting will restrict Contact Duplicates to only the Contacts from the same Account as the Routed Contact. Unchecking this setting will allow LeanData to identify Contacts from other Accounts as potential Duplicate Contacts.

Overwrite Field Preferences

These settings will control how to approach overwriting fields when there are blank values in these fields, either on the routed record, or the existing record.



Always: This setting will always overwrite the values on the master record with the values from the routed record.

Only if blank: This setting will only overwrite blank fields on the master record with values from the routed record and will preserve the values in populated fields on the Master record.

If new value is not blank: This setting will overwrite the values on the master record with the values from the routed record, as long as the values on the routed record are not blank. In other words, LeanData will only overwrite a value with a non-blank value. This will prevent LeanData from blanking out an existing value on the master record if one exists. This is the most frequently chosen setting.

Please Note: Unchecked checkbox fields are not considered blank.

Best Practices

- Certain operational standard fields will always be preserved on the existing Master Record, regardless of the settings you select:
    - **Owner, Created Date, Created By, Last Modified Date, Last Modified By**
- Checkbox fields are not considered blank if they are unchecked
- Related lists and related activities will be preserved from both records.
- If you have Duplicate Rules enabled in Salesforce, please review these rules as they may conflict with LeanData Duplicate Merging. You may need to create an exception for the LeanData Integration user if you experience errors.